



How satisfied are public transport users?

NTA Customer Satisfaction Research 2018

Presentation Summary Deck – 8th October 2018

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Project no. 41300265 SMc/PMY

NTA
Údarás Náisiúnta Iompair
National Transport Authority

1.

Background & Methodology



Background & Methodology

- Surveys were conducted with users of public transport in situ to assess their level of satisfaction with service provision at an overall level and across a range of key metrics. Respondents were asked to consider the journey they normally make when giving their opinion.
- Interviews were conducted face-to-face with people aged 16+. Respondents were recruited at stops/stations, located throughout the country, and included customers waiting to board or alighting public transport services. Interviews were conducted using CAPI tablets with pre-programmed survey script.
- A total sample of 2,545 customers were interviewed, consisting of the following:
 - Dublin Bus n=545
 - Luas n=304
 - Iarnród Éireann Commuter n=193
 - Iarnród Éireann InterCity n=157
 - DART n=206
 - Bus Éireann n=1140 } Combined for analysis as Iarnród Éireann
- Data for all public transport operators has been weighted to reflect the number of passenger journeys.
- Fieldwork was conducted from 24th May to 30th June 2018. Fieldwork for the previous wave was conducted from early October until mid November 2017.



Details on Statistical Differences

The table below outlines the differences in percentage values that indicate a statistical significance difference using a 95% confidence interval. The widest occurrence is at percentages around 50% and the narrowest the closer you get to 0% or 100%, an indication given by the 90%/10% figures below.

	Sample size	% @ 50%	% @ 90%/10%
Total#	2,545	+/- 1.9	+/- 1.2
Dublin Bus	545	+/- 4.2	+/- 2.5
Bus Éireann	1,140	+/- 2.9	+/- 1.7
Iarnród Éireann	350	+/- 5.2	+/- 3.1
DART	206	+/- 6.8	+/- 4.1
Luas	304	+/- 5.6	+/- 3.4

Example:

The difference between 91% vs 93% on a sample size of 2,545 is significantly different

The difference between 91% vs 89% on a sample size of 350 is not significantly different

2.

Key Research Findings

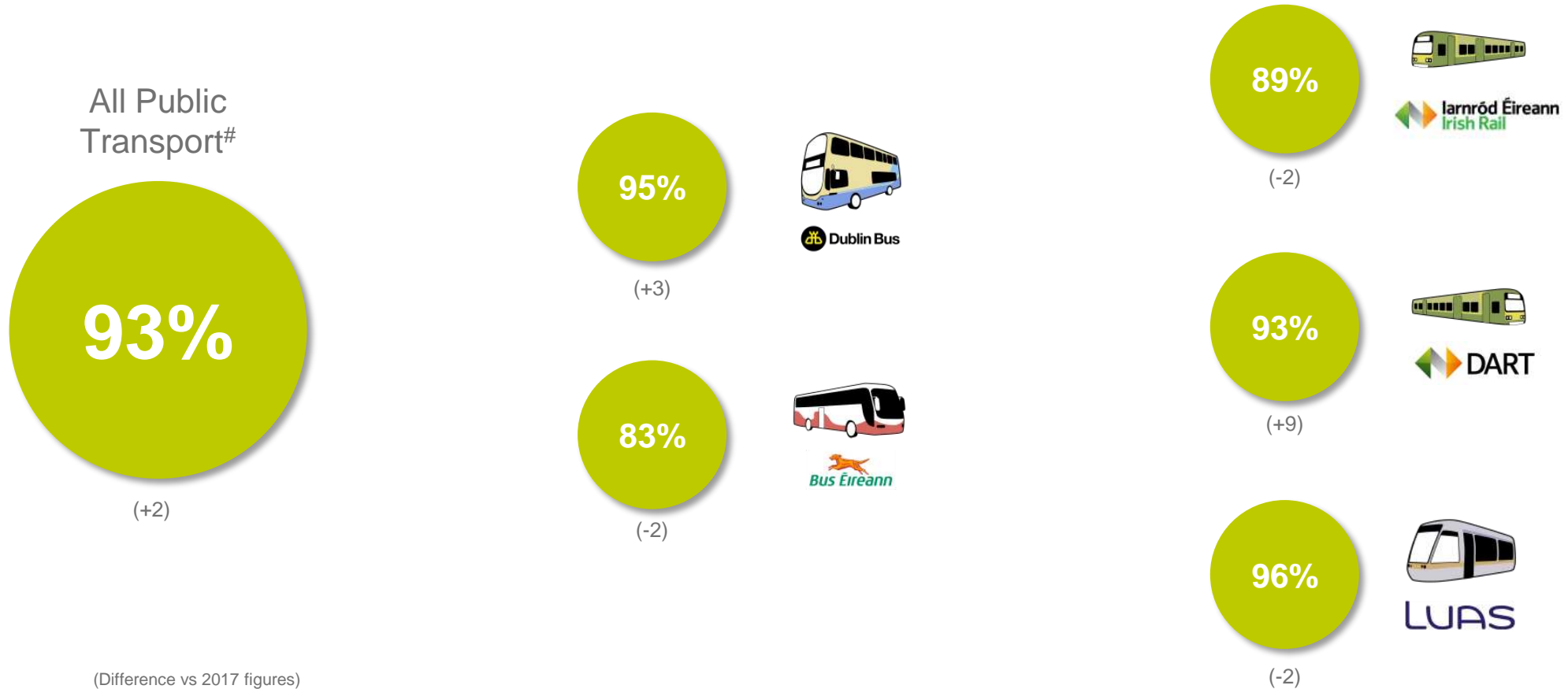


Overview of Customer Satisfaction Research findings

- Feedback remains positive, with a significant increase of 2 percentage points on last Autumn from 91% to 93%. Across the modes, in excess of four in five are satisfied with that mode
- The mode with the lowest satisfaction score in Autumn 2017, DART, has improved significantly from 84% to 93%. Amongst those who performed well previously similarly high levels have been maintained. All other scores are relatively unchanged.
- Overall customer satisfaction is very high with Luas, Dublin Bus and DART all recording exceptionally high scores in the nineties. Low levels of dissatisfaction are evident across the modes.
- The vast majority of customers (nine in ten) thought the service was the same or better than twelve months ago, with a very tiny proportion stating it was worse.
- Overall one in five put forward suggestions for improvements (21%). Across the modes of transport Bus Éireann, DART, and Iarnród Éireann customers were more likely to suggest improvements; for Bus Éireann and DART these tended to be related to frequency.

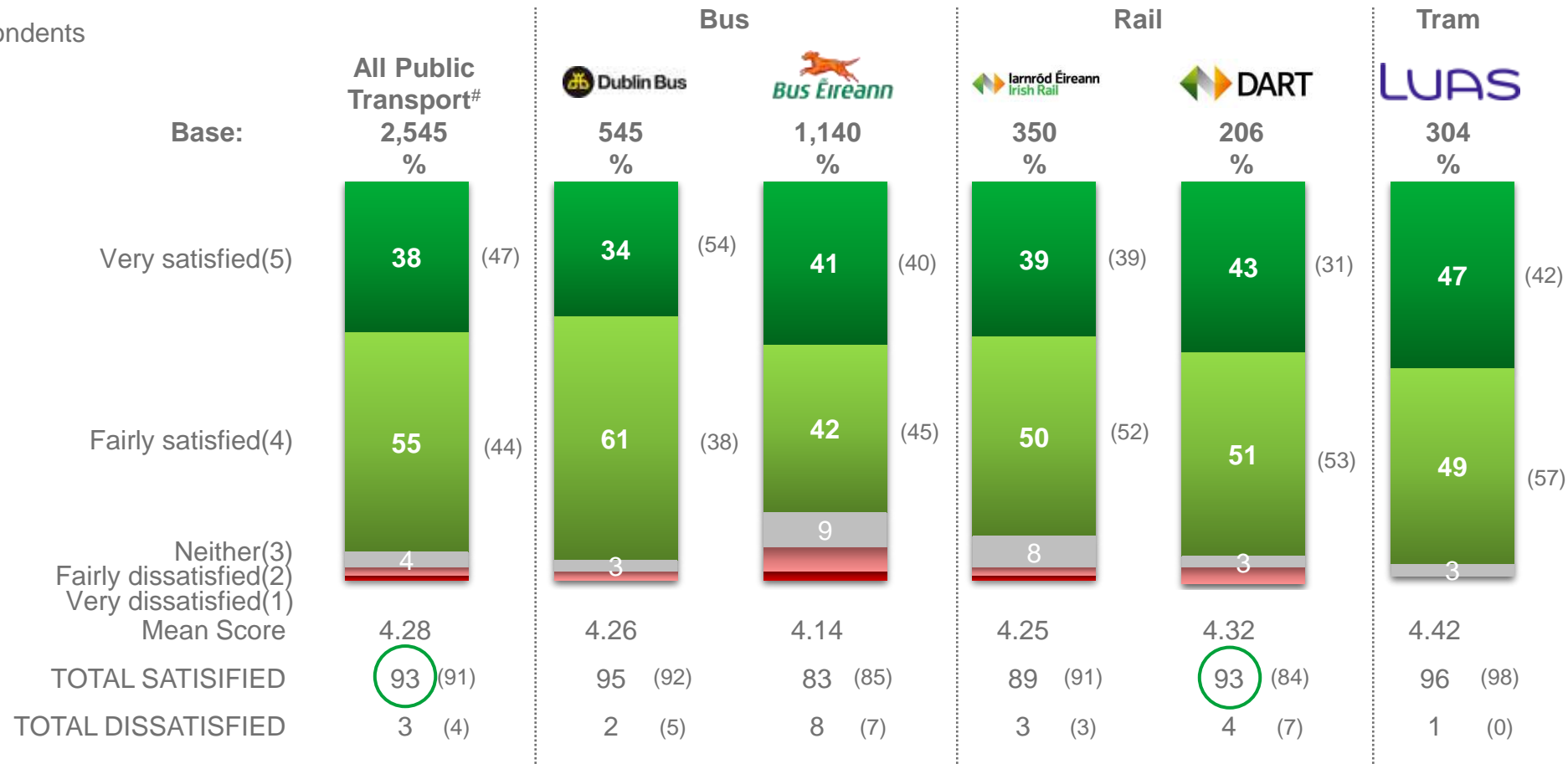
Summary Overall Customer Satisfaction by mode of transport: over nine in ten users of public transport are satisfied with the service provided - a significant increase on last year - with DART users showing the highest increase on 2017 figures (up nine percentage points).

Base: all respondents



Overall Satisfaction by mode of transport show low levels of dissatisfaction reported. There are significant increases in satisfaction among DART users, along with small increases among most other modes, leading to an overall significant increase across public transport. Dublin Bus is still positively regarded, but at a fairly rather than very satisfied level.

Base: all respondents

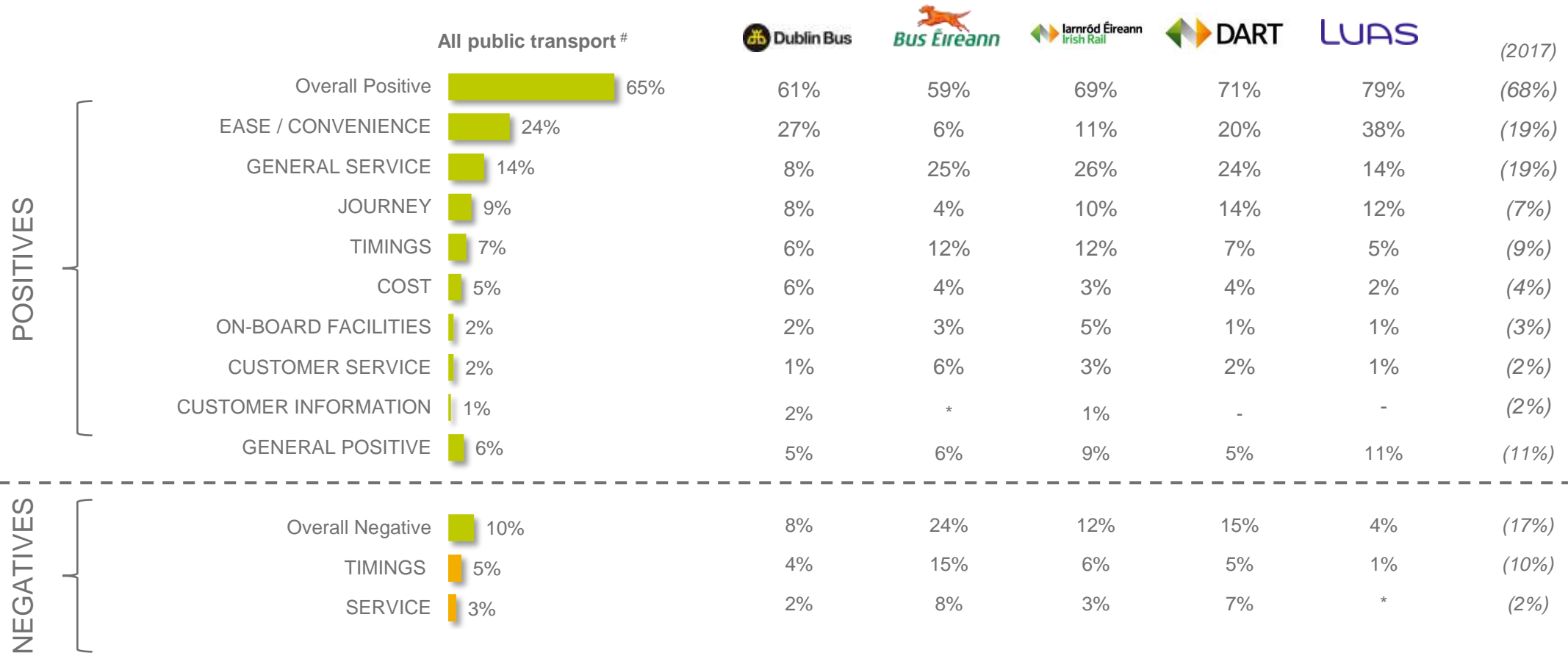


○ ○ Significant Difference at 99% or 95% level vs 2017
(Green is significantly up and red is significantly down)

(2017 figures)

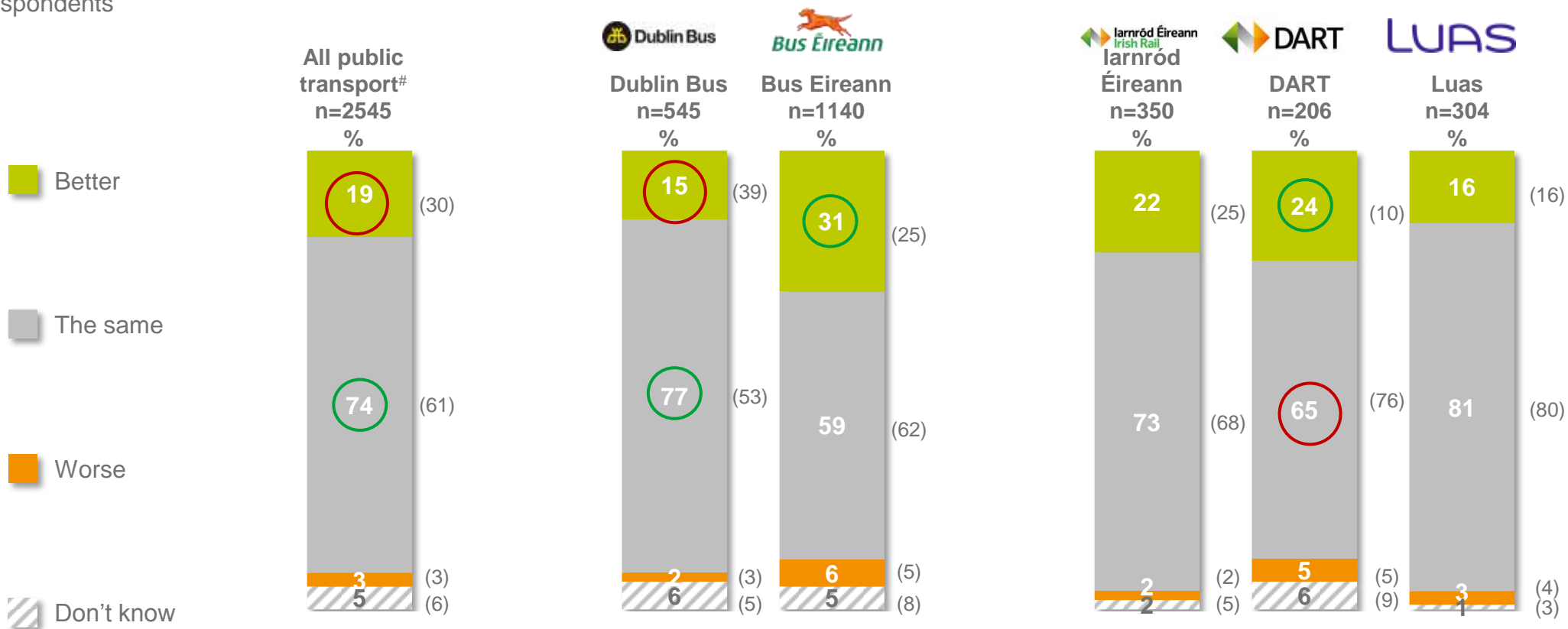
Spontaneous reasons for satisfaction: positive feedback received was mostly in relation to ease/convenience of service and service in general. Negative feedback, albeit low, mainly related to timings.

Base: all respondents



Perceptions of improvements to service: Bus Éireann performed strongly with one in three respondents stating the service is better versus twelve months ago (a six percent increase on 2017 figure), followed by DART at 24% (an increase of fourteen percentage points on 2017). Luas showed no change. However, for Dublin Bus 77% say it has stayed the same resulting in three quarters (74%) of public transport users interviewed saying the service has stayed the same over the past 12 months.

Base: all respondents

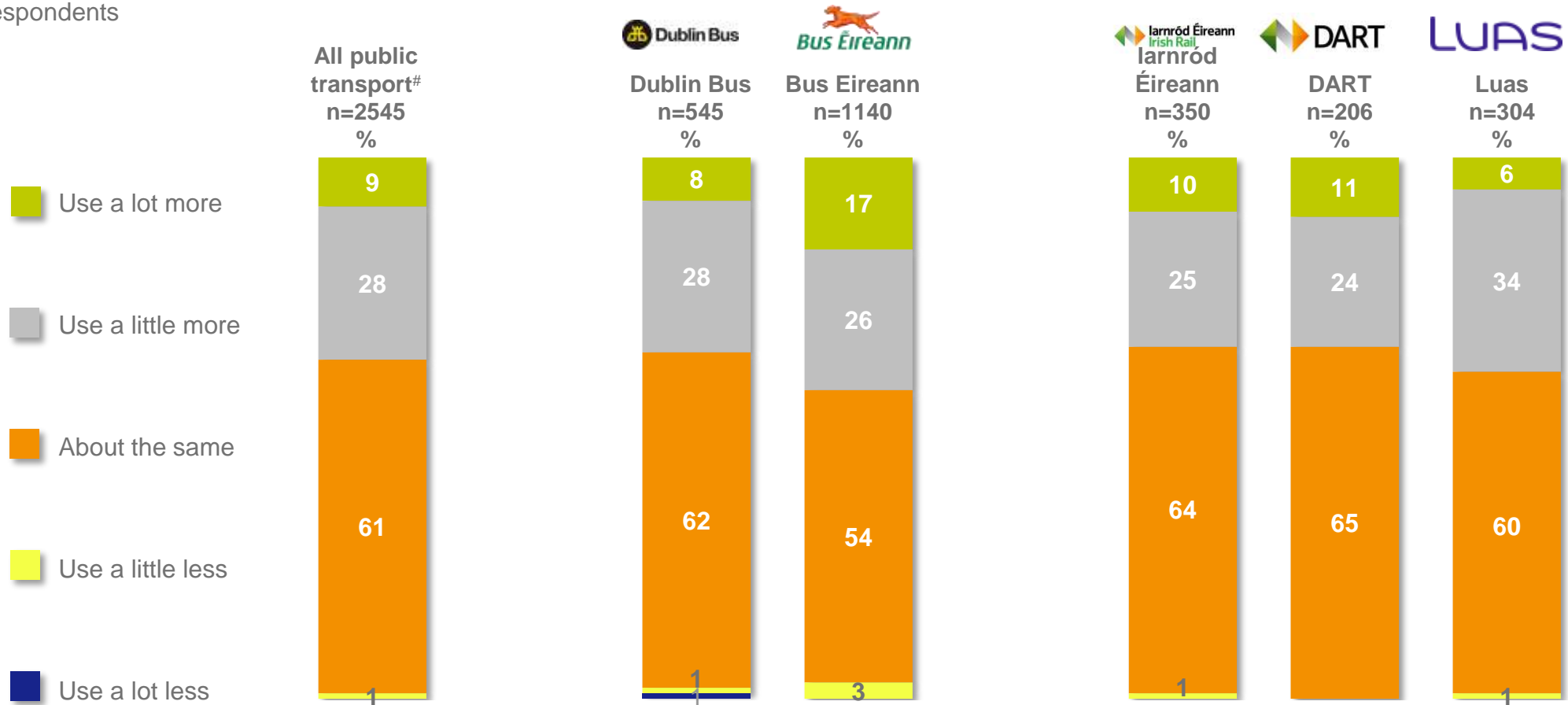


(2017 figures)

○ ○ Significant Difference at 99% or 95% level vs 2017
(Green is significantly up and red is significantly down)






Use of mode of transport over last twelve months: Overall four in ten claim to use public transport a lot/a little more. Three in five have similar usage levels compared to last year. Across all modes of transport Bus Éireann sees the biggest increase in passengers with one in six customers using it a lot more over the last twelve months.

Base: all respondents



Summary of key satisfaction metrics by mode of transport: very positive scores across all modes for key metrics, with DART users indicating significant increases in four out of five metrics. Although results are positive for Bus Éireann, in comparison to other modes, it lags behind by a small margin for all attributes except comfort, where it has seen a significant improvement.






Base: all respondents

% very/fairly satisfied	All Public Transport# n=2545 %	 Dublin Bus n=545 %	 Bus Éireann n=1140 %	 Iarnród Éireann Irish Rail n=350 %	 DART n=206 %	 LUAS n=304 %
	(2,229)	(408)	(925)	(393)	(202)	(301)
OVERALL SATISFACTION	93 (91)	95 (92)	83 (85)	89 (91)	93 (84)	96 (98)
Getting to destination on time	95 (93)	96 (93)	86 (86)	97 (96)	94 (86)	99 (100)
Reliability of arriving on time	92 (89)	93 (89)	81 (84)	95 (95)	94 (77)	98 (99)
Frequency of service	95 (91)	95 (92)	89 (89)	95 (89)	96 (80)	99 (99)
Level of Comfort	97 (97)	97 (99)	98 (93)	96 (97)	94 (90)	98 (99)
Value for money*	91 (89)	91 (90)	85 (83)	87 (81)	97 (82)	96 (98)

(2017 figures)

Summary of overall service metrics by mode of transport: Luas outperforms other modes of transport for frequency - buses overall show lowest scores for these metrics. DART has seen increases across a number of metrics.

Base: all respondents

	All Public Transport# n=2,545 %	 Dublin Bus n=545 %	 Bus Éireann n=1,140 %	 Iarnród Éireann Irish Rail n=350 %	 DART n=206 %	 LUAS n=304 %
Base:	2,229	408	925	393	202	301
OVERALL SATISFACTION	93 (91)	95 (92)	83 (85)	89 (91)	93 (84)	96 (98)
Weekday frequency	89 (91)	88 (93)	86 (84)	91 (89)	91 (81)	94 (94)
Weekend frequency	83 (82)	81 (86)	77 (78)	81 (70)	89 (64)	93 (90)
Hours of operation	85 (92)	82 (95)	86 (84)	89 (87)	88 (85)	89 (93)
Ability to get first bus/train/tram that arrives	88 (92)	87 (95)	90 (86)	90 (93)	94 (89)	89 (91)
Ability to make connections with other public transport	85 (88)	82 (94)	86 (79)	85 (82)	90 (76)	91 (87)
Bus routes in area convenient for travel needs##	n.a.	87 (n.a.)	89 (n.a.)	n.a.	n.a.	n.a.

(2017 figures)
New question 2018

○ ○ Significant Difference at 99% or 95% level vs 2017 (Green is significantly up and red is significantly down)

Satisfaction at the stop/station: notable areas for improvement are Iarnród Éireann and DART range of facilities at station, car parking facilities, bus interchange and bike storage, however improvement is evident on most of these areas versus 2017. Bus Éireann has also seen improvements on many metrics versus 2017.

Base: all respondents

General indication	% very/fairly satisfied					
	All Public Transport#	Dublin Bus	Bus Éireann	Iarnród Éireann	DART	Luas
Base:	2,545 (2,229)	545 (408)	1,140 (925)	350 (393)	206 (202)	304 (301)
ALL MODES						
Condition of stop/shelter/platform	88 (94)	86 (98)	92 (83)	90 (90)	88 (89)	92 (94)
Cleanliness of stop/shelter/station	88 (93)	85 (97)	92 (85)	91(89)	88 (85)	92 (92)
Presence of graffiti	88 (93)	88 (98)	89 (84)	87 (84)	87 (92)	91 (90)
Crowding at stop / platform	84 (89)	79 (94)	90 (85)	88 (88)	89 (78)	89 (86)
Lighting	85 (89)	80 (92)	92 (80)	88 (87)	89 (90)	n.a. (89)
Personal safety	88 (94)	86 (98)	95 (87)	89 (91)	88 (90)	93 (93)
RTI sign*	88 (92)	85 (94)	92 (88)	93 (91)	93 (91)	90 (86)
BUS / TRAIN						
Information panel*	90 (90)	n.a.	92 (80)	88 (91)	90 (88)	n.a.
Shelter provides sufficient cover during periods of bad weather*	89 (92)	87 (95)	95 (88)	87 (89)	90 (85)	n.a.
BUS						
Timetable info provided	n.a.	80 (95)	n.a.	n.a.	n.a.	n.a.
Seats at the stop*	n.a.	87 (95)	96 (90)	n.a.	n.a.	n.a.
TRAIN						
Range of facilities at train station	n.a.	n.a.	n.a.	82 (79) ↑	87 (77) ↑	n.a.
Car parking facilities at/near train station	n.a.	n.a.	n.a.	70 (64)	83 (64)	n.a.
Bus interchange at train station	n.a.	n.a.	n.a.	79 (73)	90 (74)	n.a.
Bicycle storage facilities at train station	n.a.	n.a.	n.a.	64 (64)	79 (59)	n.a.
LUAS						
Ticket machine	n.a.	n.a.	n.a.	n.a.	n.a.	91 (87)
Alighting at the stop	n.a.	n.a.	n.a.	n.a.	n.a.	94

(2017 figures)

Satisfaction with your regular journey: strong satisfaction scores evident across all modes of transport, with Bus Éireann making many improvements and strategic improvements across Rail and DART.

Base: all respondents

% very/fairly satisfied	General trend	↓	↓	↑	↔	↔	↔
	All public transport#	Dublin Bus	Bus Éireann	Iarnród Éireann	DART	Luas	
	Base:	2,545 (2,229)	545 (408)	1,140 (925)	350 (393)	206 (202)	304 (301)
CLEANLINESS							
Cleanliness of the outside		89 (94)	88 (97)	95 (89)	88 (86)	91 (85)	90 (94)
General cleanliness inside		88 (91)	85 (95)	91 (85)	89 (85)	91 (82)	92 (91)
Visibility through the windows		89 (93)	87 (97)	95 (87)	89 (90)	89 (91)	91 (90)
GETTING ON/OFF							
Ease of getting on		89 (93)	87 (97)	96 (88)	89 (89)	91 (87)	89 (90)
Ease of getting off		91 (94)	89 (98)	96 (88)	91 (93)	90 (86)	91 (91)
The bus pulling right up to the kerb##		87	85	95	n.a.	n.a.	n.a.
The time taken for people to get on the bus##		88	86	95	n.a.	n.a.	n.a.
SEATS/COMFORT							
Level of crowding inside		85 (86)	83 (91)	89 (86)	86 (78) ↑	86 (70) ↑	88 (83)
Availability of seats		87 (88)	85 (93)	93 (86)	85 (78) ↑	86 (72) ↑	89 (90)
Condition of the seats		89 (93)	87 (98)	95 (87)	89 (86)	87 (83)	90 (90)
ENVIRONMENTAL FACTORS							
Air quality inside		87 (91)	85 (96)	92 (87)	85 (89)	89 (79)	92 (88)
Temperature inside		88 (93)	87 (97)	92 (87)	86 (86)	87 (87)	90 (90)
Lighting inside		90 (95)	88 (99)	95 (88)	91 (93)	89 (91)	93 (91)
Noise of engine		88 (93)	86 (96)	92 (87)	83 (90)	91 (88)	93 (91)
PERSONAL SAFETY							
Personal safety during journey		91 (95)	89 (98)	96 (90)	92 (92)	88 (89)	94 (90)
COMFORT							
Safety of driving*		90 (95)	88 (98)	96 (87)	n.a.	n.a.	91 (91)
Smoothness of driving		89 (92)	86 (96)	96 (88)	91 (90)	91 (88)	93 (88)
CUSTOMER INFORMATION/SERVICE							
Route information on display outside		89 (93)	88 (98)	92 (87)	91 (88)	91 (85)	92 (89)
Customer information on display inside		87 (93)	85 (99)	88 (83)	86 (88)	90 (85) ↑	93 (89)
Helpfulness of staff		89 (91)	88 (96)	92 (83)	91 (82)	88 (77) ↑	92 (90)
The driver was professionally dressed##		90	88	96	n.a.	n.a.	n.a.

(2017 figures)

Combining all common satisfaction metrics in the survey we have statistically grouped these into common factors and calculated the key drivers of satisfaction overall: aspects of timing – punctuality and frequency are of key importance among those interviewed

Access/Visibility/Safety

- Ease of getting off/on
- Lighting inside
- Personal safety on journey
- Condition of seating
- Visibility through windows

Crowding/Seating

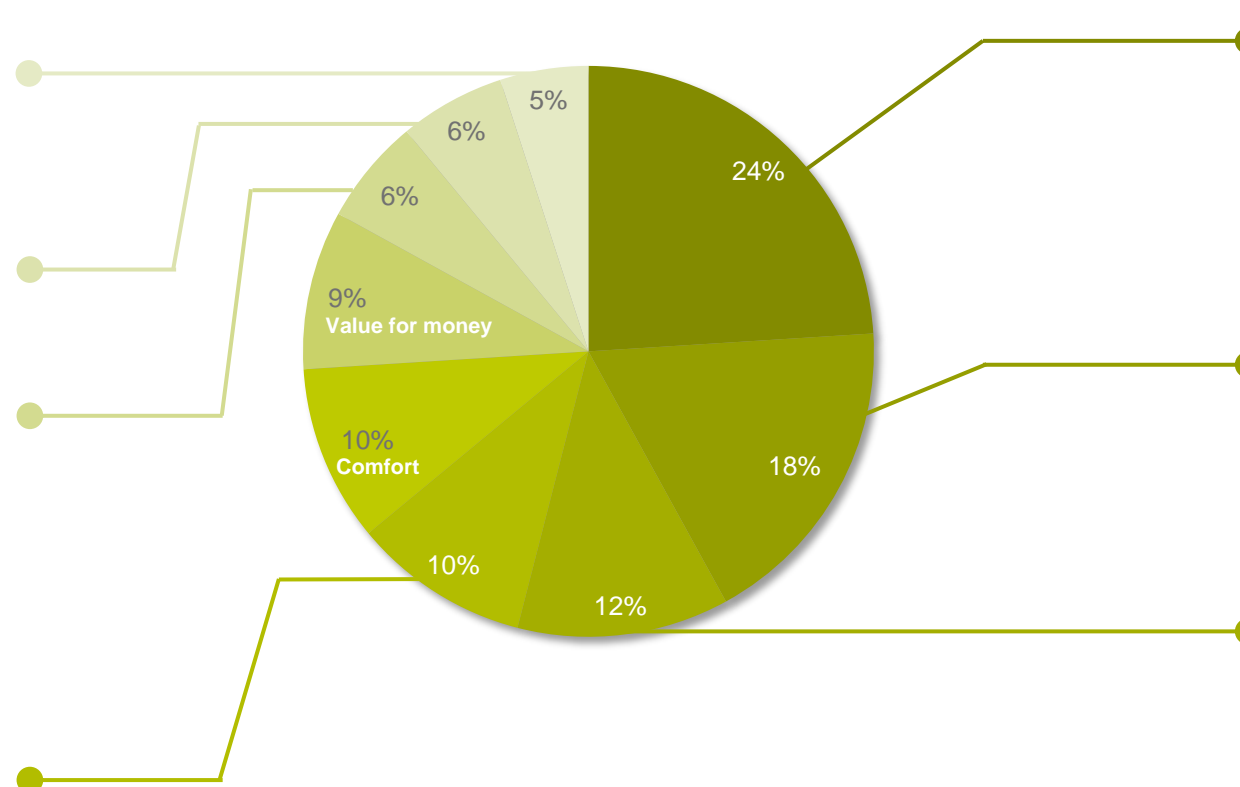
- Level of crowding inside
- Availability of seats
- Levels of crowding at stop/platform

Cleanliness/Environment

- Air quality
- Noise of engine
- Cleanliness of inside
- Temperature inside
- Helpfulness of staff
- Smoothness of driving
- Cleanliness of outside

Stop/Station

- Presence of graffiti at stop/station
- Cleanliness of stop/station/platform
- Condition of platform/stop
- Lighting at stop/station
- Personal safety at stop/station



Punctuality

- Getting to destination on time
- Reliability of arriving on time
- Frequency of service

Frequency

- Hours of operation
- Frequency at weekends/weekdays
- Connections with other transport
- Get on first service

Information

- Route information on outside
- Customer information on display

3.

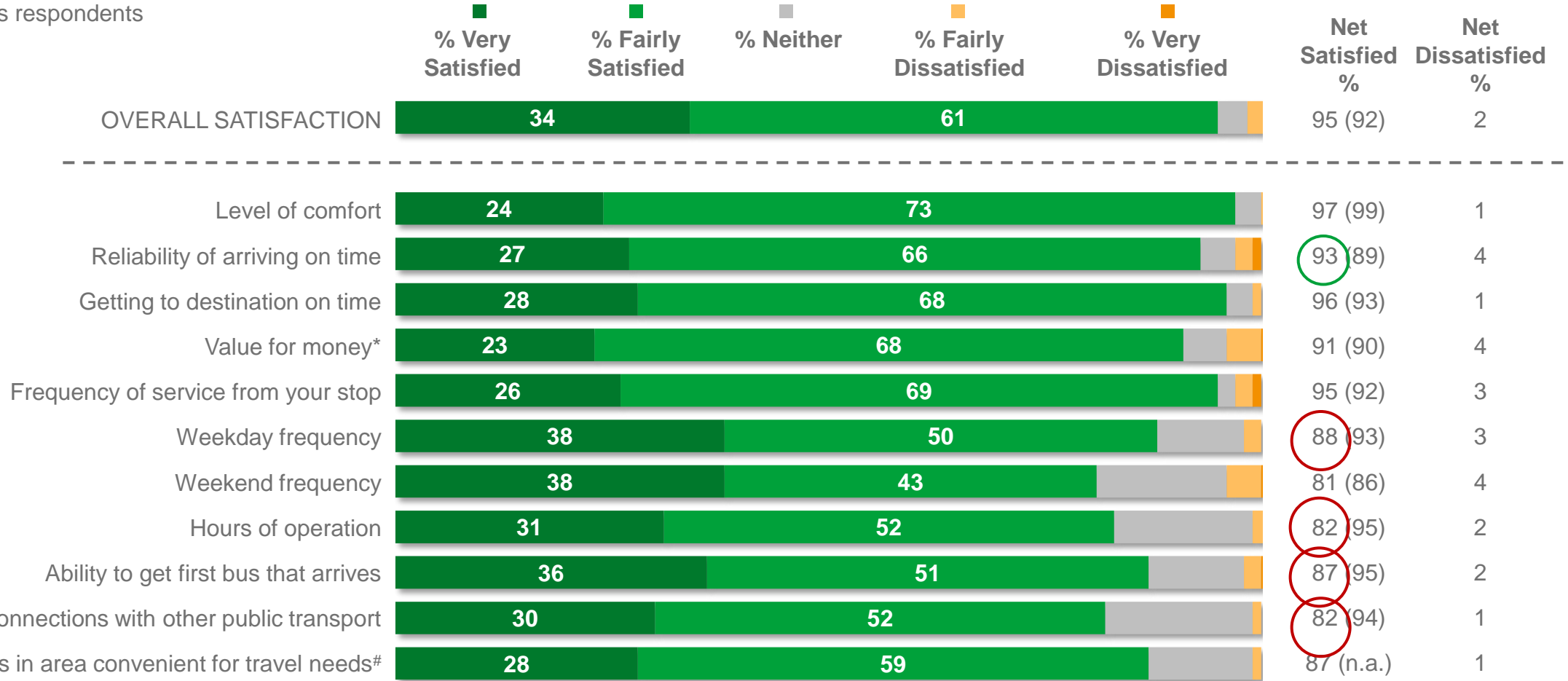
Summary by Mode



Key Satisfaction Metrics for Dublin Bus:

Dublin Bus performs well for comfort, getting to destination on time and frequency of service from stop. Weekend frequency, hours of operation and ability to make connections, although very positive, score relatively lower compared to other factors.

Base: all Dublin Bus respondents



(2017 figures)
New question 2018

Summary of Customer Satisfaction with Dublin Bus

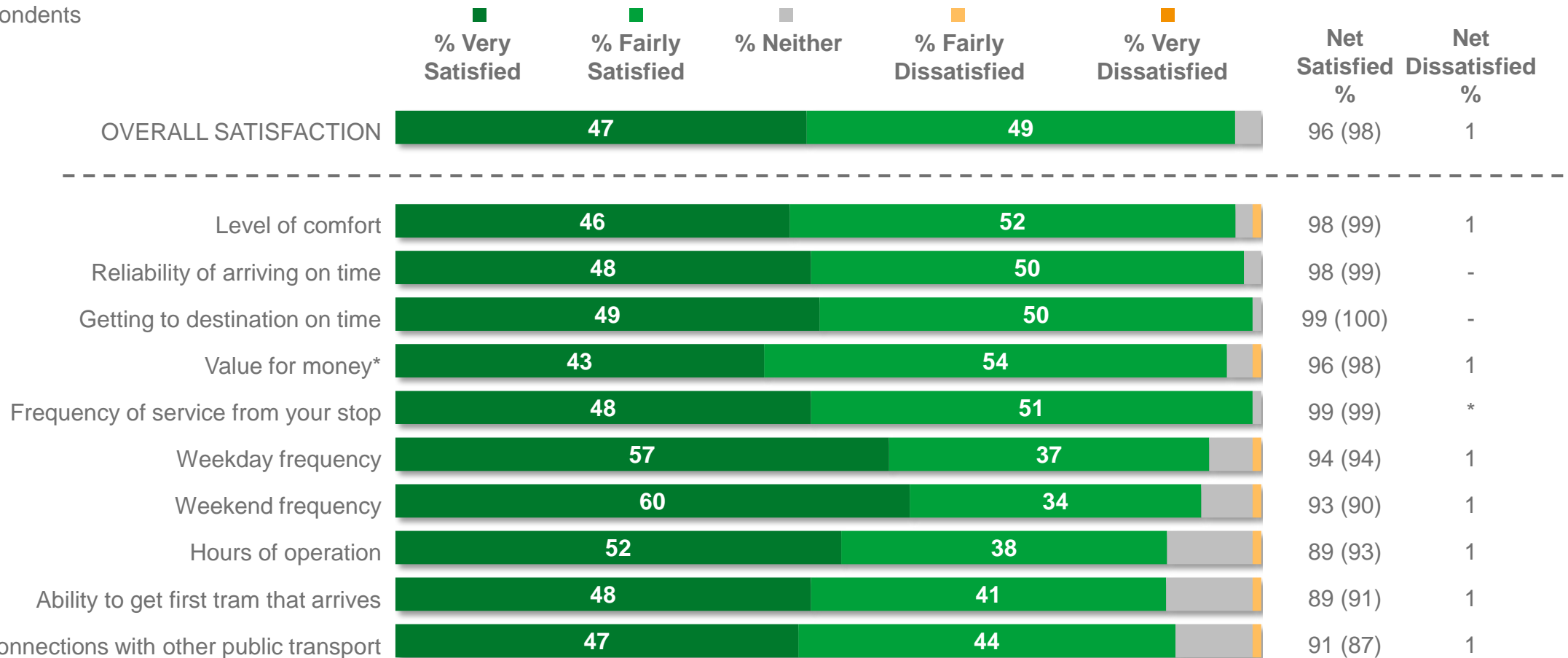
- Satisfaction with Dublin Bus services remains very strong at **95% satisfied** versus 92% in Autumn 2017 – second only to Luas at 96%. However there has been a shift from very to fairly satisfied over the time period from 54% very satisfied to 34% this time.
- Only 15% say the service has improved year on year (compared to 39% last time) with 77% stating it has stayed the same
- On key metrics while only reliability of arriving on time has significantly improved (89-93%), comfort, getting to destination on time and frequency all remain high at 95%+
- However, on individual attributes at the stop and on board all have dropped from 90s% to 80s% range.
- When asked 84% could not think of any improvements, with frequency quoted by 6%.
- On balance, satisfaction levels with Dublin Bus remain high, less intensely, being more ‘fairly’ than ‘very’ satisfied in Spring 2018 than Autumn 2017.

Key Satisfaction Metrics for Luas: Luas scores exceptionally well across all attributes, with virtual unanimous satisfaction with frequency.

Base: all Luas respondents



LUAS



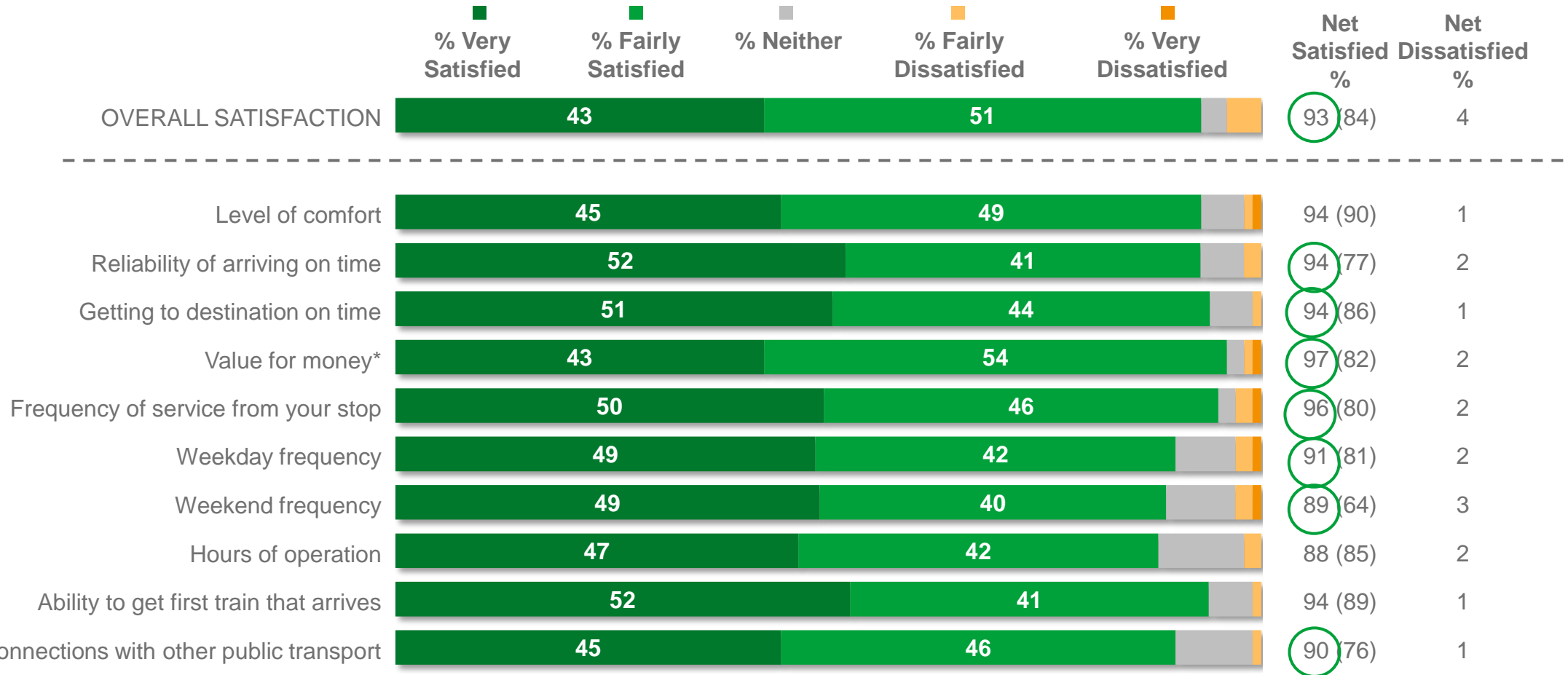
(2017 figures)

Summary of Customer Satisfaction with Luas

- Satisfaction with Luas services tops the poll with **96% overall satisfaction**, only marginally down from 98% in Autumn 2017 – not a significant change. Those who are very satisfied are up from 42% to 47%.
- Very consistent with last wave 16% say the service has improved and 81% say it has stayed the same.
- As was the case last wave, scores on key and individual metrics remain very high for Luas customers; frequency of service and getting to your destination on time at 99%.
- When asked 91% could not think of any improvements, with frequency only quoted by 4%
- Satisfaction levels with Luas remain very high, even with the extension of the Green Luas line - which anecdotally impacted on available space on board for some customers – this is not borne out in this survey.

Key Satisfaction Metrics for DART: DART scores have improved across the board versus Autumn 2017, and perform above average (relative to other DART scores) for value for money and frequency of service from stop.

Base: all DART respondents



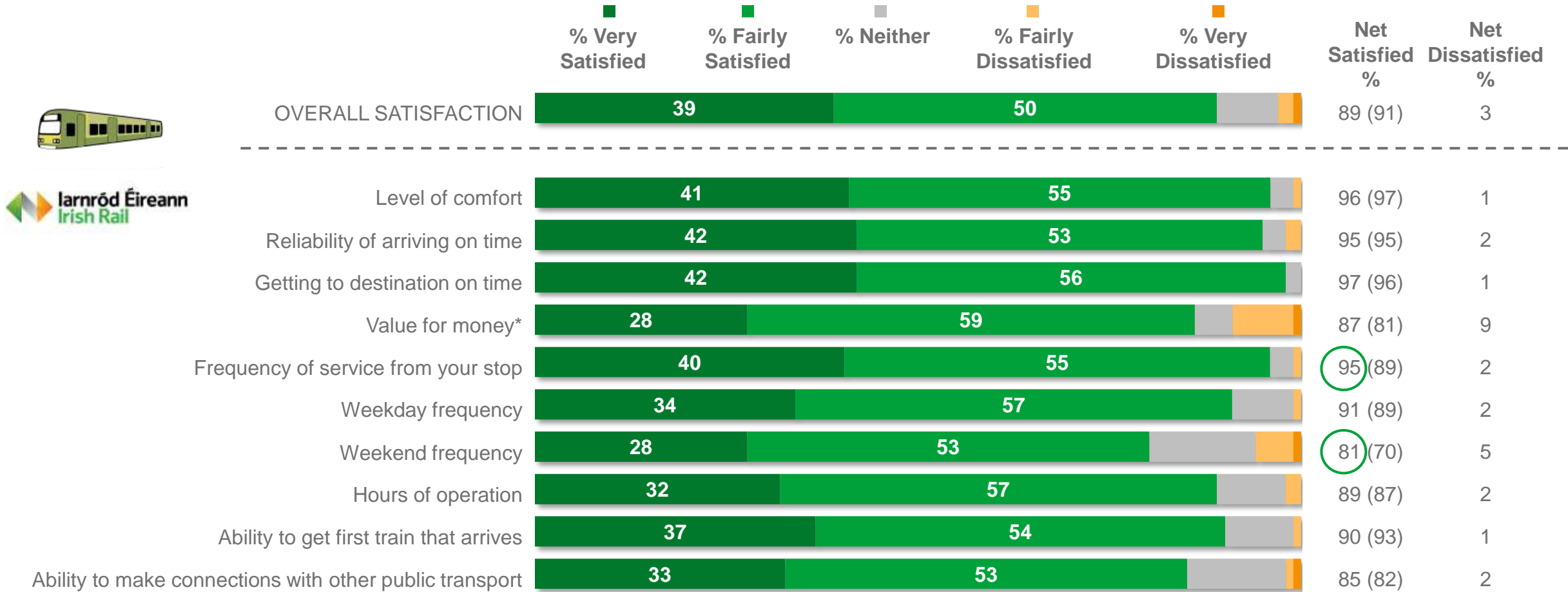
(2017 figures)

Summary of Customer Satisfaction with DART

- Satisfaction with DART services significantly improved from 84% to **93% overall satisfaction**. There have been improvements across most metrics, most of them to a significant degree.
- Almost one in four (24%) state that the service has improved in the last year.
- There has also been improvement in individual aspect metrics, especially in those associated with stations.
- 71% provided overall positive feedback when asked for reasons for satisfaction or dissatisfaction, although 15% provided some negative feedback.
- Two thirds (69%) could not think of any improvements, the main topic for suggestion being around frequency (9%) and on board facilities & comfort (5%).
- There are very positive improvements for DART services since the last wave of research, with many significant improvements on key metrics.

Key Satisfaction Metrics for Iarnród Éireann: Getting to destination on time, reliability and level of comfort all score exceptionally well, as does frequency of service from stop. However, frequency at weekends scores relatively low.

Base: all Iarnród Éireann InterCity and Commuter respondents



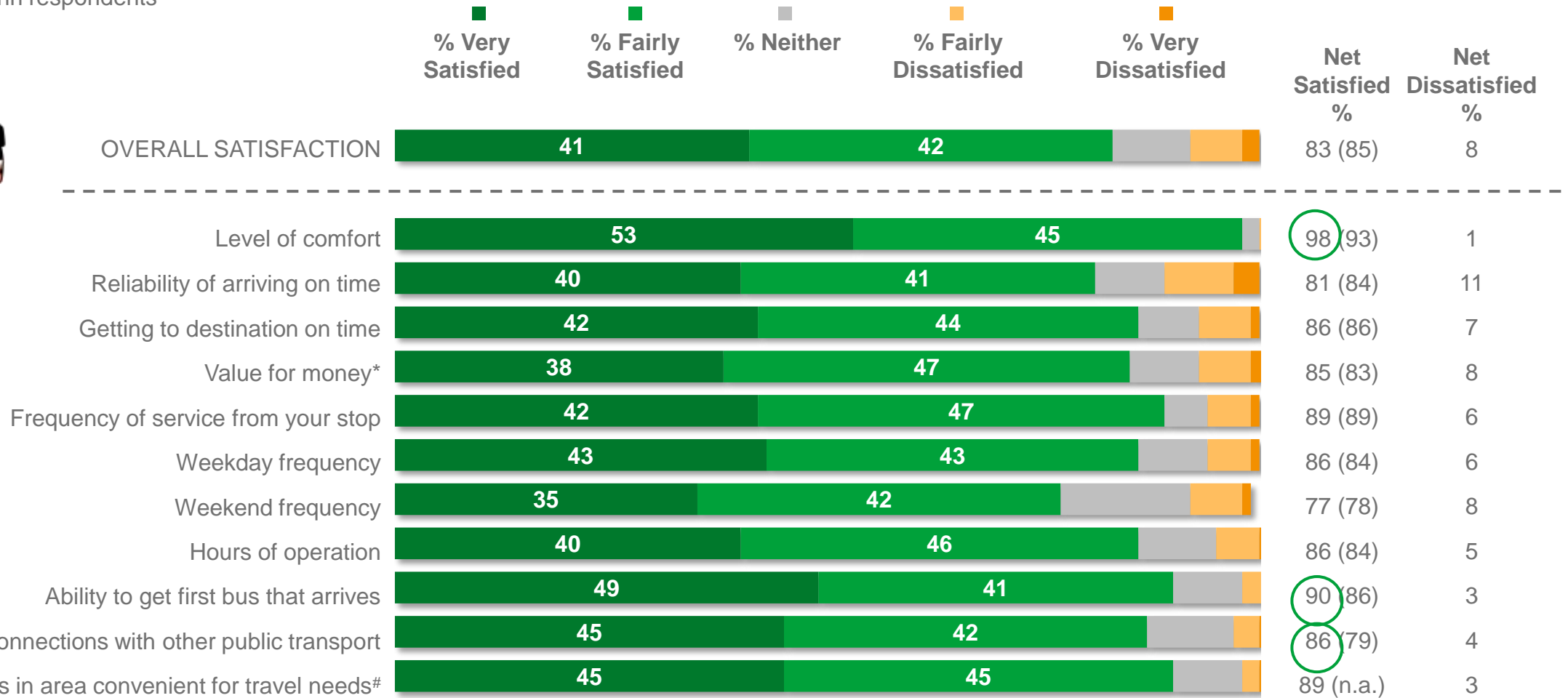
(2017 figures)

Summary of Customer Satisfaction with Iarnród Éireann

- Satisfaction with train services have remained relatively unchanged at **9 in 10 overall satisfaction (89%)** Only 3% are dissatisfied.
- There has been a slight change (from 25% to 22%) in those who thought the service had improved year on year but this is not significant.
- There has been a perceived improvement in frequency of service and weekend frequency.
- Two thirds (68%) were not able to provide any suggestions for improvement and no one issue came out on top.
- Feedback on Iarnród Éireann is very much in line with previous survey, with the majority of customers being satisfied with the service.

Key Satisfaction Metrics for Bus Éireann: key strengths for Bus Éireann are level of comfort and ability to get first bus that arrives, with areas for improvement identified as frequency at weekends and reliability of arriving on time.

Base: all Bus Éireann respondents



(2017 figures)
New question 2018

Summary of Customer Satisfaction with Bus Éireann

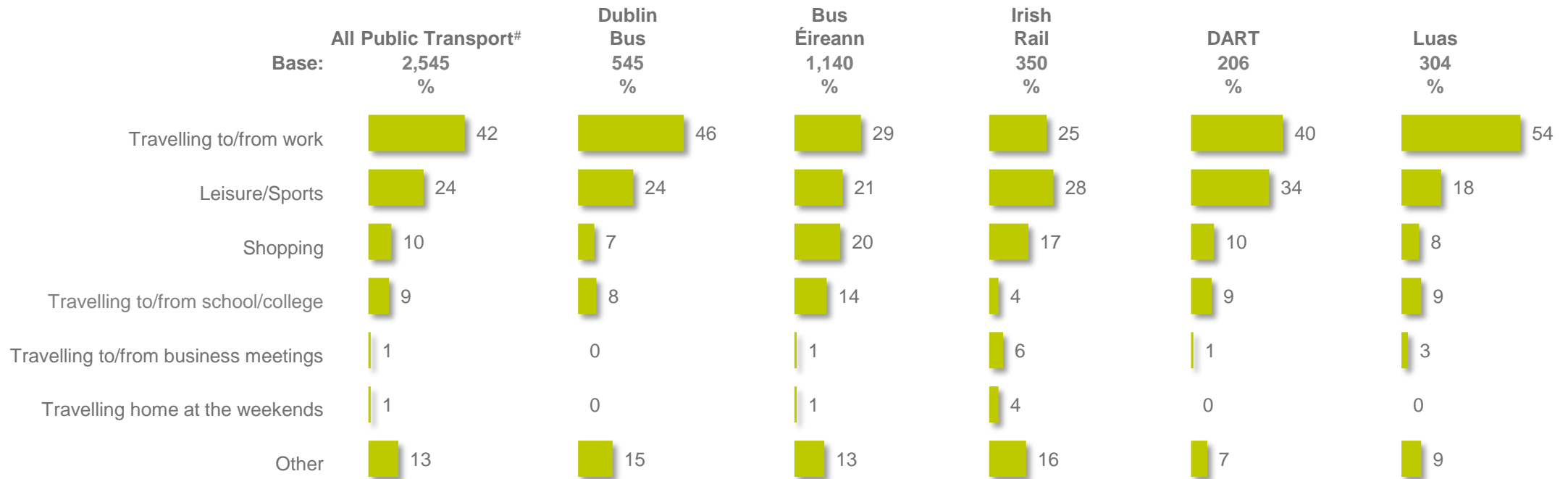
- Satisfaction with Bus Éireann services remain relatively unchanged with **83% satisfaction**. However, it does attract the highest dissatisfaction ratings at 8%
- There is positive momentum with almost one in three (31%) saying the service has improved in the last year (significantly up from 25%).
- There has also been significant improvements in the following: level of comfort, ability to get the first bus and making connection to other transport. With regard to feedback for stations and on board there has been increases since the last wave in Autumn 2017. However, hasn't translated to overall satisfaction levels for Bus Éireann.
- Six in ten (61%) did not suggest improvements, but more than one in ten (11%) mentioned frequency and 7% timings – both of which are important drivers to overall satisfaction. This has resulted in keeping the overall satisfaction metric unchanged, while feedback on individual aspects has improved.
- There are differences in Bus Éireann regions with Dublin having high overall satisfaction (91%) - although lower levels of being very satisfied (28%) are evident in Dublin - along with Waterford city (91% overall). Galway and Limerick cities have the highest levels of dissatisfaction.

5.

Use of Transport



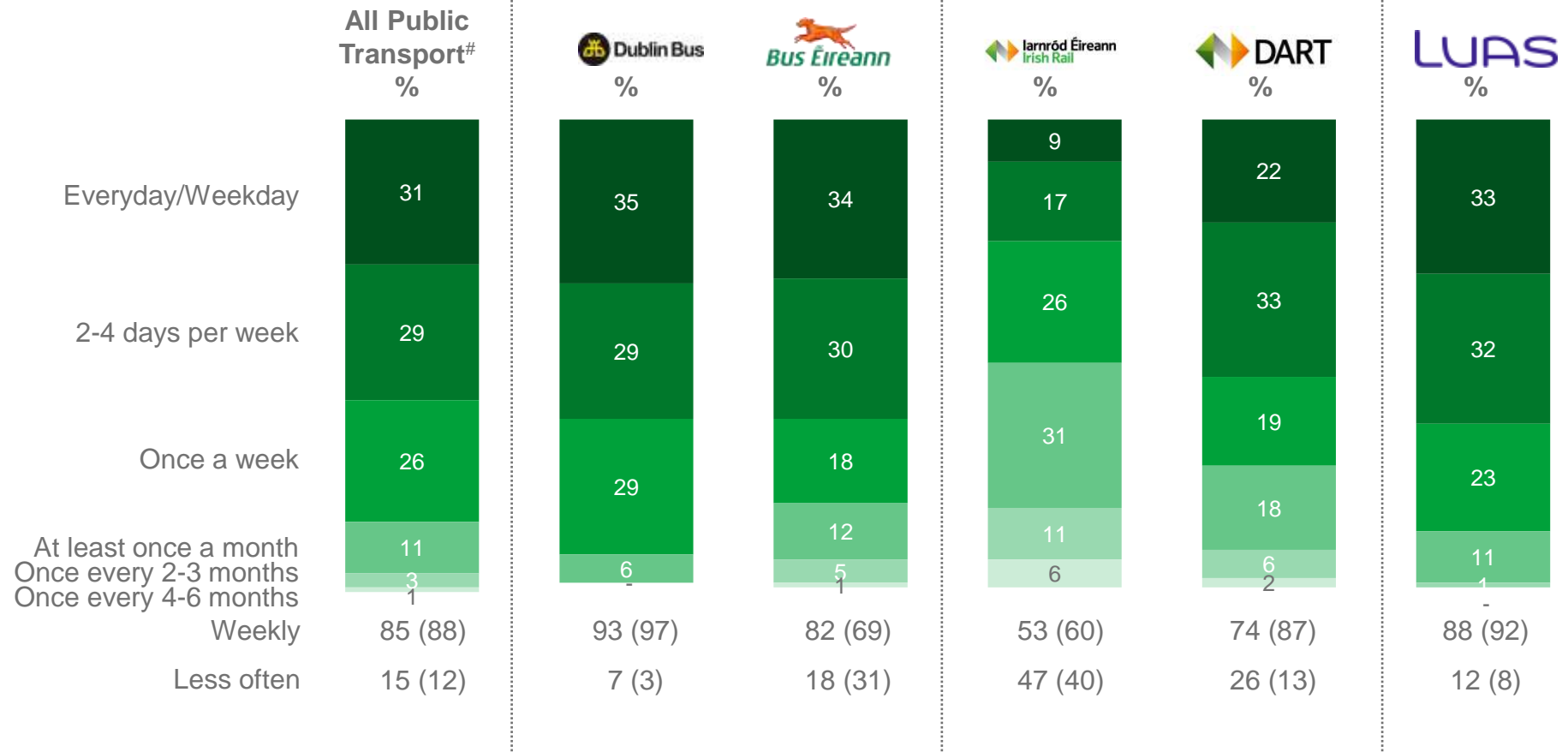
Main reasons for using the public transport modes: overall travelling to/from work is the main reason for using public transport (42%), followed by leisure/sport (24%) and shopping (10%).



*=less than 0.5%

Travel Frequency: Dublin Bus users travel most frequently, followed by Luas customers. As seen earlier Bus Éireann customers are using the service more and this is reflected in the increase in the weekly figure this wave vs last (up thirteen percentage points).

Base: all respondents



(2017 figures)

Suggestions for improvements were highest for Bus Éireann and mostly centred around frequency. Overall one in five people put forward suggestions.

	All Public Transport# %	Dublin Bus %	Bus Éireann %	Irish Rail %	DART %	Luas %
No suggested improvements	79	84	61	68	69	91
Service generally	2	1	5	1	1	*
Frequency	6	6	11	5	9	4
Routes	1	1	2	1	-	-
Station/Stop facilities	1	*	1	5	2	-
Maintenance	1	*	1	1	1	-
On board facilities and comfort	2	2	4	5	5	1
Crowding	1	1	*	2	-	2
Cost	2	1	6	3	1	1
Timings	2	2	7	1	1	*
Customer information	2	2	2	1	2	*
Access	*	-	*	*	-	-
Miscellaneous	1	-	1	1	3	1

*=less than 0.5%



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